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ABSTRACT

This booklet for trustees of institutions of higher education provides guidelines for conducting a presidential search. The booklet notes that the presidential search can offer the institution an opportunity to take stock of its recent history and future prospects and draw a campus together. Among guidelines offered for planning the search are: review relevant passages in bylaws, codes, and state regulations; appoint a search committee worthy and capable of performing the task; identify the tasks the search committee must perform; spell out the characteristics the board wants in its next president; decide on the degree of openness of the search process; and consider the role of the outgoing president. Following this planning process the board is urged to engage constituents and identify institutional directions. An effective search process is described as involving the following steps: (1) generate an applicant pool; (2) select and screen semifinalists; (3) check references; (4) interview semifinalists; (5) conduct campus visits by the leading applicants; (6) make the final selection; and (7) smooth the new president's arrival. Also briefly addressed is the use of interim presidents and search consultants. (Contains 12 references.) (DB)

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ED 428 593

BOARD BASICS

BOARD LEADERSHIP

ESSENTIALS OF PRESIDENTIAL SEARCH

BY WILLIAM A. WEARY

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ASSOCIATION OF GOVERNING BOARDS OF UNIVERSITIES AND COLLEGES

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The *Board Basics Series* is intended to strengthen the effectiveness of governing boards and trustees by providing information about board roles and responsibilities. This series of publications is intended to inform debate and discussion, not to represent or imply endorsement by the association or its members. Additional copies are available by calling the AGB Publications Department at 800/356-6317.

Essentials of Presidential Search

Selecting a chief executive officer is a board's most important task. Not surprisingly, great anxiety and expectation normally surround the presidential search. Boards that harness that energy well can launch a significant and successful process that yields benefits far beyond the identification of the best next president. A presidential search also should offer an opportunity to do the following:

- take stock of the institution's recent history, current situation, and future prospects;
- generate institutional consensus and draw a campus together;
- prepare the institution for a new chief executive;
- create a leadership group able to guide the new president; and
- establish initial expectations for the new president's performance.

Good searches can be measured by how well they respond to these important opportunities. Why do some searches go awry? Consider some common causes of a *bad* presidential search: a disruptive campus climate, loss of confidentiality (leaks), outside interference, having no rules of the process or changing them midstream, inexperience in running a search, insensitivity to constituent needs and desires, poor board understanding of the role of the search committee and vice versa, lack of clarity on the type of leader needed, and insensitivity to candidates' needs and desires. Careful preparation can prevent or minimize most of these flaws.

Unfortunately, for many institutions the anxiety of a search can foster an unhealthy desire to appoint a president as soon as possible, at any cost. Not only does such haste tend to foment problems, but it also prevents full exploitation of an important moment in an institution's history.

PLAN THE SEARCH. Searches attract and retain the best candidates and move forward most expeditiously when boards carefully plan and reflect on the process. Before a search officially begins, board members should consider these important tasks.

- *Review relevant passages in bylaws, codes, and state regulations.* If an institution has not conducted a presidential search in some time, board members may be unaware of the ways in which board bylaws, policies, and state and system regulations and practices already prescribe their work. It is best to clarify ambiguities in these procedures at the start because someone at some point in a search process is certain to refer to the institution's practices in earlier presidential searches. Although previous practices are not necessarily compelling, they may provide valuable options and direction. In any event, the human-resources office should be consulted about institutional policies regarding affirmative action and equal opportunity.

- *Appoint a search committee worthy and capable of performing the task.* The search committee members' expertise and fitness to serve should be readily apparent to community members and others with a vested interest in search results. Essential qualifications include knowledge of the institution and commitment to its greater good, credibility and clout, a willingness to devote time, and the ability to maintain confidentiality. In addition, board members who sit on the committee should represent emerging and established board leadership and, for the most part, intend to remain on the board beyond the conclusion of the search.

  While search committee members serve best when not officially "representing" specific groups of people, the committee probably should reflect an institution's major constituencies. Trustees and faculty certainly will be members of the committee, and alumni, students, administrators (except for those who report directly to the president), classified employees, and members of the broader community also may be invited to serve. Sometimes, a single person may represent more than one constituency. Although the board alone appoints the committee, it also may ask constituent groups to work with the

SEARCHES ATTRACT AND RETAIN THE BEST CANDIDATES AND MOVE FORWARD MOST EXPEDITIOUSLY WHEN BOARDS CAREFULLY PLAN AND REFLECT ON THE PROCESS.

committee in the selection process. This role will vary from institution to institution. Balance in gender, race, ethnicity, and age is a valuable goal, but it is not always met. Remember: No single committee can include every group.

The number of committee members may vary; eight to 15 is comfortable. The committee chair—always a trustee—maintains regular contact with the broader institutional community, the media, and the candidates. He or she must be steady, articulate, and able to convey excitement about the institution's mission and possibilities. The confidence and shared concepts that members of the committee develop in the course of the search are likely to allow them to become a major leadership group during the next presidency.

- *Identify the tasks the search committee must perform.* Typically, these include preparing a leadership statement (see page 4), generating a pool of applicants, screening the pool, interviewing semifinalists and checking their references, identifying finalists, arranging on-campus visits, and making recommendations to the board.

Essential to specify in advance is the form of recommendation the board wishes the committee to make. Last-minute changes or requirements with respect to presentation of a single name or perhaps three-to-five names can create political chaos. Requesting three-to-five qualified candidates, unranked, leaves the board with the greatest flexibility and good chances of a successful, seamless appointment.

- ***Spell out the characteristics the board wants in its next president.*** The "leadership statement," which should be a public document, is based upon a careful analysis of the institution's current needs and opportunities and should emerge from the careful involvement of the institution's entire community. It provides the only reliable guide to the recruitment and screening of candidates and the appointment of the next chief executive. Clarity and consensus among board members, along with good process, are important ingredients of a successful search.

- ***Decide the degree of openness for the search process.*** In public institutions, open-meeting and open-record laws may dictate the definition of confidentiality. Institutions tend to generate and maintain the largest number of good candidates when they publicize only the names of finalists, when the search committee deliberates in private, and when only the committee chair speaks for the committee. Shifts in definition and approach can evaporate a candidate pool overnight—and end a search.

- ***Resolve how to handle the potential candidacy of any interim or acting president or of any "heir apparent."*** Most experts suggest that interim presidents serve best when they are not candidates for the permanent position; some boards stipulate this arrangement in the interim's contract. Obvious heirs apparent can keep applicant pools small and unrepresentative of what the institution otherwise might expect, so trying to "test" the heir apparent against a national pool really cannot occur.

- ***Know when the next president should begin work.*** Curiously enough, some boards have difficulty deciding when a presidency should begin; instead of establishing a firm date, such boards may set a range. Thorough searches ordinarily take about six months from beginning to end, excluding summers (which are best for preparing, not searching). Worthy candidates often lose interest in longer processes. Moreover, aiming for a January 1 start date yields a different candidate pool from a July 1 start date because many individuals feel more comfortable completing the academic year before they move. Consequently, the search "window" is open widest at the start of the academic year. Search committee members should establish a calendar for their work far in advance.

- *Set a preliminary budget.* Searches tend to be far more expensive than most boards imagine. Full-time secretarial support may be necessary for several months, and the committee may need to hire temporary help. Advertising in the journals that reach desirable candidates costs substantial sums. Bringing semifinalists to a central meeting place (often housing them overnight as well) and hosting finalists and spouses on campus for two or three days add still more costs. If the search committee needs to be lodged for those events, such expenses must be accounted for as well.

  A search consultant may cost one-third of the chief executive's first year's cash compensation, plus expenses. Then there are the search committee's "incidentals," such as telephone, stationery, postage, and printing. Finally, remember that the institution no doubt will pay for the new president's moving expenses and, perhaps, the costs of redecorating the president's home. Because the total cost of the search can be a relatively large expense for some institutions, careful planning is essential.

- *Set the range of compensation for the next president.* Good candidates will want to know. Last-minute changes can destroy a pool of finalists. Research need not be time-consuming: Each year, the *Chronicle of Higher Education* publishes compensation statistics, and some regional associations keep such statistics.

- *Review and modify, as necessary, policies on presidential performance reviews and contracts.* Changes to such policies are easier to make between presidencies—and often difficult to establish thereafter. Good policies and procedures attract strong candidates. The literature on assessments has begun to grow and reflect how much currently is known about good practice. The occasion of a search is an opportune time to make any desired changes. The leadership statement may be a good guide in this regard.

- *Consider the role of the outgoing president.* Often, the departing chief executive can address various thorny issues best resolved before the successor's arrival. Frank discussions between the outgoing president and board chair and/or the executive committee may prove helpful. Topics of conversation typically might include board structure and personnel. Most boards tend to know just how their departing chief executive might assist in this regard.

CLARITY AND CONSENSUS, ALONG WITH GOOD PROCESS, ARE IMPORTANT INGREDIENTS OF A SUCCESSFUL SEARCH.

- *Review the board's role in the course of the search.* The first step is to realize that the search committee's work is analogous to that of all other committees. It convenes separately, conducts its work, and returns with its recommendations. The governing board, in short, leaves the search committee free to do its job—and that includes respecting the confidentiality of candidates and proceedings. Second, the board has an obligation to identify the names of suitable candidates and to pass them on to the search committee as nominations. Finally, the board needs to consider how it will respond to the search committee's recommendations. Will it wish to interview all of those recommended? Only one or two?

- *Finally, compile the foregoing into a written charge to the search committee, a charge the board formally approves.* Clear instructions prevent misunderstandings and promote a smooth search. The charge to the search committee is the most important document of the search process—and probably should be delivered in person by board leadership.

ENGAGE CONSTITUENTS. Involving an institution's constituents serves two important functions. First, it builds support for the new chief executive. And second, it reveals important perspectives and wisdom that substantially improve the quality and outcome of the search. All of the following promote healthy and productive engagement:

- respectful, appropriate, and timely news about the structure, timing, and progress of the search;

- balance in the membership of the search committee;

- consultation in preparing the leadership statement and evidence that the messages conveyed have been heard; and

- opportunities to meet with finalists as they visit the campus and to pass on individual observations.

IDENTIFY INSTITUTIONAL DIRECTIONS. One key to a successful search and presidency is to reach consensus—at the start of the search—on the work to be done during the next presidency. That consensus, translated into the characteristics of the person most likely to advance the new agenda, becomes the leadership statement, the single grid against which candidates are measured. Competing, unresolved visions generate competing candidacies and, eventually, internal dissension.

Strong leadership statements feature the accomplishments of the preceding presidency and the challenges that lie ahead. They provide an overview of the agenda the institution must address in the next five years and translate those challenges into experiences a successor will need to advance that agenda. The specificity of the described tasks and experiences allows the search committee to determine with some accuracy whether a candidate "fits." As a search progresses and candidates' personal traits and appearances become evident and gain importance, the leadership statement is the search committee's guidepost.

Helpful leadership statements enable the search committee and board to write advertisements, recruit candidates aggressively, screen the applicant pool, check references, conduct meaningful interviews with semifinalists, select finalists, assess finalists in on-campus visits, make recommendations to the board, and make a final selection.

Well-crafted leadership statements also tend to be the best magnet for attracting the right candidates. When leadership statements are honest, positive, and specific, they capture the attention of individuals ready to be compelled and reveal opportunities the presidency presents. When they are generic, however, they attract generic candidates who may lack the requisite skills to succeed and advance the institution's mission.

When they are distributed throughout an institution's community, good leadership statements can help focus the community on the institutional agenda and work that lies ahead. This enables all constituents to view the new president's performance in terms of the institutional vision, not his or her personality traits. Indeed, good statements illustrate the institution's expectations of presidential performance and serve as the basis for future performance reviews.

A consultant may draft the leadership statement after interviewing key constituents. The statement then goes to the search committee for editing and ultimately to the board for approval. Thereafter, the institution's public-affairs office publishes and distributes it throughout the community and on the institution's Web site. Each nominee and candidate receives a copy.

EFFECTIVE SEARCH PROCESS. A sound process engages the constituents in meaningful ways, advances the search smoothly, leads to greater clarity among search committee members and on campus, and leaves the board free at the end to make the selection. The major steps of an effective process follow:

- *Generate an applicant pool.* Remember always that the goal is to produce not the largest number of candidates but the largest number of *appropriate* candidates—that is, those who match the leadership statement. A sharply defined profile of the desired president may prompt some candidates to opt out, while it also draws others in. Both results are desirable, yet may yield smaller numbers. Consider these hints to generate applicants:

  1. Advertise in the journals prospective candidates read—the *Chronicle of Higher Education*, *Black Issues in Higher Education*, *HACU Voice*, and *Community College Times*. Advertising produces the largest number of candidates. Although most will not match the desired profile, a few good candidates probably cannot be reached by any other means.

     Publish the ads for about a month. Indicate the date on which review of applications begins. Request nominations as well as applications. Define what your institution means by "confidentiality." Request a résumé. And require a letter of interest that responds to a summary version of the leadership statement or to the full statement posted on the institution's Web site. A request for written references serves little function and can keep some potential applicants from applying.

  2. Prepare a list of individuals from various institutions who are likely to know potential applicants, and ask them for nominations. Follow up with telephone calls. Although such aggressive recruiting helps produce strong candidates, it unfortunately remains relatively uncommon.

A SOUND PROCESS ENGAGES THE CONSTITUENTS IN MEANINGFUL WAYS, ADVANCES THE SEARCH SMOOTHLY, AND LEADS TO GREATER CLARITY AMONG SEARCH COMMITTEE MEMBERS.

3. Handle the candidates with courtesy. Applicants should receive a letter from the search committee accompanied by a copy of the leadership statement, a summary of the search procedure, an invitation to write a more thorough letter responding to the statement's points, and basic institutional materials—the admissions viewbook, an annual report, a copy of the alumni magazine, and so on. Respond promptly and courteously to inquiries, and notify candidates of their status as decisions are made. Good treatment captures and maintains candidates' attention and increases the institution's desirability.

- *Select and screen semifinalists.* Four basic guidelines substantially increase the search committee's chances of making sound decisions:

1. Search committee members should read candidates' files at one sitting over two days; this permits consistency and comparability of decisions, engages all members, sets a quick pace of work, and prevents advance "politicking." Duplicate no materials. During the first day, members should strive to reduce the pool to 20 or 30; the second day, to about eight.

2. Search committee members should be first to read candidates' files. Unless there are hundreds of applications (unlikely), this allows the committee to gauge the caliber of the applicant pool and builds confidence in its ability to make tough decisions.

3. Each committee member should have the leadership statement on hand during the screening process.

4. Members should not discuss the merits or shortcomings of any candidates during the process of reading files.

- *Check references.* Good reference checks not only prevent unpleasant surprises, but they also increase the committee's knowledge of candidates and help sharpen questions for the interview process. Reference checks can occur at a number of points in the search process. To make best use of the search committee's time and provide the most helpful information, reference checks probably are most appropriate after semifinalists have been selected but before they are interviewed.

  The secret to effective reference checks is the appropriate use of the leadership statement. References fear being asked to "betray" a candidate, yet they want to help the committee. If members describe the position—as outlined in the leadership statement—and ask the reference how the candidate would fare in such a position, the reference is free to be candid. The focus of the presidency, not the virtues of the candidate, becomes the basis of the match.

- *Interview semifinalists.* Well-conducted interviews of semifinalists provide a relatively reliable guide to the potential match between institution and candidate. Usually, a one-month window following the screening and individual notification is sufficient time to allow for interviews. Conducted at a well-equipped, confidential gathering spot off campus (an airport hotel tends to work well), semifinalist interviews allow the search committee to select finalist candidates for on-campus visits. Some public institutions will need to adhere to open-meeting laws, but the goal at this point should be to protect candidates' privacy. A number of principles guide the interview process.

  1. As with the screening of candidates' files, conduct the interviews all at once, back to back. Doing so allows the comparisons that are essential to sound decisions.

  2. Again, in keeping with the guidelines regarding the reading of candidates' files, prohibit any discussions of candidates along the way. Views will shift during the course of the interviews, and airing individual assessments can freeze development of additional perspectives.

  3. Make sure the entire committee is present for all of each interview so each member has the same information about each candidate. Split meetings, in which halves of the committee share candidates for a fixed time and then switch, are less effective.

4. Take 15 minutes or so prior to each interview to review the results of the reference checks.

5. Ask a handful of search committee members to develop a fairly general question focused on each key section of the leadership statement. These questions—approved in advance by the committee—become the standard inquiries asked of all candidates and allow the rest of the interview to be freewheeling.

6. Allow two hours for each interview. The first hour can focus on the standard questions; during the second, the candidate may ask questions of the committee.

7. Committee members should take notes during the interviews. At the conclusion of each one, members might ask themselves a series of questions: What is my gut feeling about this candidate? What would a long board meeting be like with this person? Did I learn anything? Is there more I want to learn from this candidate? What kind of interaction did the candidate inspire with the group? Did the candidate engage us? Lecture us?

8. At the end of all the interviews, committee members should write down the names of the five individuals they would like to invite to campus and then collect and compare the choices. There is no need to hold lengthy discussion about each of the candidates. More likely than not, the process will have generated considerable consensus on at least three.

- *Conduct campus visits.* Campus visits promote acceptance of the search process among constituents, help sell candidates on the institution, and provide yet another measure of the candidates' fit. It is not unusual for the front-runner coming out of the semifinalist interviews to suffer reversals on campus or for another candidate's stature to rise dramatically.

The search chair congratulates those invited to campus, informs them that coming to campus makes their candidacy public, and sends them a final round of information about the institution. One of every four or five candidates invited to campus typically drops out before the visit. By the same token, campuses have a hard time paying adequate attention to more than four finalists. Inviting five tends to be safe.

THERE IS NO NEED TO HOLD LENGTHY DISCUSSION ABOUT EACH OF THE CANDIDATES. MORE LIKELY THAN NOT, THE PROCESS WILL HAVE GENERATED CONSIDERABLE CONSENSUS ON AT LEAST THREE.

As with screening and interviewing semifinalists, finalist visits should occur consecutively. If two days are allotted for each visit, the campus can complete the process in two weeks, with Wednesdays and weekends free for last-minute adjustments and rest.

On-campus visits should be set up to allow various constituencies access to candidates. Included should be key trustees, the current president, the senior administrative team, and faculty, student, and alumni leaders. One or two receptions or open meetings can be helpful in introducing the candidate to larger numbers of people. At an appropriate moment, the search committee chair and board chair can meet with the candidate and begin discussing a compensation package, should an offer be forthcoming.

Because of the logistical complexities of campus visits, the search committee may set up a subcommittee to handle them. It also may appoint an evaluation subcommittee to prepare, distribute, collect, and analyze comment sheets on each finalist. Typically, such documents feature the summary leadership statement on one side and blank spaces describing the strengths and weaknesses of each candidate on the other. Of course, the comment sheets also should enable respondents to add their general comments. The sheets should be distributed at the start of each campus visit and collected at its close by a member of the subcommittee; no sheets should be accepted later than the end of a candidate's visit, and comparisons among the candidates should not be allowed.

By asking individuals who meet with the candidates for their personal responses, the committee is assured of a wide and valuable sample of opinions. The committee also can make clear that it accepts no "votes" or rankings by constituent groups.

In the course of campus visits, search committee members can verify educational credentials and conduct additional reference checks with individuals not named by the candidates—chairs of the faculty senate or student government association, other administrators, trustees, and the like. In some instances, search committees also conduct credit-report and criminal-record checks. In others, some members visit candidates' campuses.

The committee meets one last time to consider final evaluations and make its recommendations to the board.

- *Make the final selection.* Before the search committee advances its recommendations to the board, the entire board should resolve the appropriate range of compensation and perhaps begin work on a contract. Additionally, board members should have the results of interviews with finalists and should have some sense of how to proceed. In some instances, the board may feel confident in making an offer without further interviews; in others, members may bring one or more finalists back for a quick series of conversations. Once an offer is made, the candidate should be asked to respond quickly—if the offer is rejected, the board can make another offer rapidly. Once an offer is accepted, the institution and the appointee should coordinate announcements.

- *Smooth the arrival.* Presidents often joke—only half laughingly—about how they were "dropped at the gate" to fend for themselves. Wise boards carefully consider welcome and orientation arrangements. They discuss mutual expectations regarding board culture, processes, communication, and operations. They prepare a schedule of introductions, assemble a reading list about the institution, set up communication channels, and perhaps schedule a series of workshops to familiarize the new president with the institution. A wise board also will give the new president an opportunity to express his or her viewpoints on a range of issues. Regardless of specific welcome and orientation events, effective boards overcome the temptation to succumb to paralysis at the successful conclusion of a search. Rather, they provide the active assistance new leaders require to settle in.

INTERIM PRESIDENTS. In some situations, boards are well advised to consider carefully whether to hire an interim president. If a search has come up dry in February or March, an interim president allows a board to recommence the process in the spring. If the president's departure is announced only a few months in advance, the same principle applies. In some circumstances, an institution requires a considerable amount of challenging work—so much so that a new president's effectiveness might be compromised. In these cases, an interim president can allow a new president to start fresh.

An *interim* president is not the same as an *acting* president. An acting president is appointed from within the institution and serves for an indeterminate time until a successor is named. As such, he or she tends to lack the structural and positional authority to effect significant short-term change and ends up keeping a seat warm. This is not always bad.

SEARCH CONSULTANTS. Boards increasingly use search consultants. Although some boards might feel confident enough to proceed on their own, most call on consultants to help them plan and carry out presidential searches. Hiring a consultant does not permit a board to abdicate its responsibilities; boards must address the search process directly. Often, the board leadership will appoint an ad-hoc transition committee to explore the capabilities of various consultants and make a recommendation to the entire board.

Search consultants not only have extensive networks of candidates, but they also provide the outside perspective to assemble a useful leadership statement and follow the procedures that ensure a smooth search.

Acting on the recommendation of an ad-hoc committee, the board can select a search consultant. It also may delegate the task to the search committee, once it is appointed. Essential in the selection of a consultant is the search committee's confidence in the individual consultant and the process used. Regardless of whether an ad-hoc transition committee or search committee makes this decision, it should consider this process a "search" in and of itself. AGB's *Guidelines on Selecting a Presidential Search Consultant and A Directory of Presidential Search Consultants* can help committees assemble a short list of consultants. Common principles apply: Conduct reference checks, read the firms' literature carefully, and finally, conduct a series of interviews with several of the most appropriate firms. A sound decision should result.

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BOARD BASICS

This publication is part of **Board Basics**, an AGB series devoted to strengthening the effectiveness of governing boards and trustees. Board Basics comprises several topic clusters—The Fundamentals, Financial Matters, Fund-Raising, Academic Affairs, Leadership, Strategic Decision Making, and Effective Committees—each of which contains several booklets. Several assumptions underlie the series:

- Academic trusteeship grows increasingly ambiguous, and trustees need concise, accessible, and focused information to help them carry out their complex fiduciary and stewardship responsibilities.
- Basic principles of trusteeship remain constant across higher education, regardless of institutional type, size, and mission. The series highlights these general principles to provide trustees with a core of knowledge they can apply to their individual institutions.
- The series addresses the distinguishing characteristics of academic trusteeship, especially as it differs in scope, substance, and focus from corporate directorships and other board service.

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